

IN THE UNITED STATES DISTRICT COURT  
FOR THE WESTERN DISTRICT OF PENNSYLVANIA

JOSEPH R. HERRON,	)	
	)	
Plaintiff,	)	Civil Action No. 15-1664
	)	Chief Magistrate Judge Maureen P. Kelly
v.	)	
	)	
INVESTMENT PROFESSIONALS INC.,	)	
	)	
Defendant.	)	

**HEARING MEMO**

HEARING HELD: Initial Case Management Conference

DATE HEARING HELD: March 23, 2016

BEFORE: Chief Magistrate Judge Maureen P. Kelly

Appearing for Plaintiff:  
Gary F. Lynch, Esquire  
Vasilea Stefanis, Esquire

Appearing for Defendant:  
Holly H. Williamson, Esquire

Hearing began at 9:59 a.m.

Hearing concluded at 10:34 a.m.

Stenographer: None

**OUTCOME:**

1. Reviewed background facts, claims and defenses.
2. Court inquired as to basis for jurisdiction as Plaintiff lived and worked in Philadelphia.  
Defendant has an office in Aliquippa, PA.
3. Discussed anticipated discovery. Initial discovery will be focused on class certification but all counsel agreed that there will be overlap and were in agreement that it was permissible and more efficient.
4. Addressed scheduling. Counsel to prepare proposed scheduling order, consistent with deadlines set for in Rule 26(f) report, and file by Tuesday, 3/29/16.

5. Parties have agreed to mediation. Discussed possible mediators in light of the nature of the claims. An amended ADR stipulation is to be filed by 3/30/16, setting forth name of agreed mediator and date for mediation. Court will then issue an ADR referral order. Mediation must be completed by 5/24/16. If it cannot be, a joint motion must be filed to extend the time for mediation by a short period of time. The Court suggested that the parties schedule a pre-mediation conference call with the mediator.

6. Each side may take a deposition or two prior to mediation.

7. The Court encouraged the parties to discuss possible early resolution of this matter.

cc: All counsel of record by Notice of Electronic Filing